Key Research Findings

Lead and Conversion Potential

By DMA

§ Both Shifflet and Conversion studies show in-state markets and Cincinnati, Louisville, and Chicago as having the highest potential for inquiries and conversion.

§ Indianapolis contains both the highest lead and conversion potential index, while Chicago shows average lead and conversion potential indexes (1999 Prizm Cluster Research).

By trip type

§ Indiana shows the greatest potential to generate visitor spending in the outdoor recreation ($423 million potential), cultural ($224 million), amusement park ($80 million), and getaway ($19 million) categories (1999 Niche Analysis Report).

By medium

§ Print mediums generally produce a lower cost per lead and cost per visit than broadcast mediums.

§ First time measurements of direct delivery conversion indicated 50+ percent took an overnight trip in Indiana.

§ Well over 20 percent of responders may not travel immediately but will save the information for future trip planning. (1998 Conversion Study).

Competitive Environment

Volume and market share

§ Indiana generates $5.9 billion in visitor spending annually, accounting for 120,000 full time jobs (1996 Economic Impact Study).

§ Indiana ranks fifth within the six-state region for overnight leisure travel with 14.9 million person trips in 1997 and 1.7 percent share of the total U.S. market (1997 Shifflet Domestic Travel Report). Ohio and Michigan capture the most travel in the region (3.3% each), followed by Illinois and Wisconsin. Kentucky reports the lowest share of the states measured, at 1.4%.

§ Cultural visitors represent 31 percent of the spending in Indiana, Getaway visitors generate 19 percent, special events percent, sports events 14 percent. (1999 Niche Analysis Report).

Marketing

§ Indiana is outspent by competitors in all media markets except Indianapolis.

§ In Chicago, Illinois Tourism is spending approximately $1.8 million in advertising. Michigan spends approximately $2 million, with Wisconsin spending $1.4 million. Indiana has historically spent about $200,000 in Chicago annually.

§ Others states outspend Indiana Tourism in Cincinnati and Louisville about two-to-one.

Product

§ Tourism product available in the Great Lakes region to travelers in the top four markets is abundant and in many ways similar to that of Indiana (1999 Competitive States Product Inventory).

Consumer Perceptions

Product ratings

§ Indiana is given high satisfaction and value ratings for its outdoor recreation product. Indiana is given average satisfaction and value ratings for its cultural, amusement park, and getaway product. (1999 Niche Analysis Report).

§ Indiana is perceived to have a good product among certain groups, but so does the competition (1999 Focus Groups).

§ Even Indiana's most notable attractions are not perceived as "enough" for a whole weekend (1999 Focus Groups).

Believability

§ Indiana is seen as safe, wholesome, friendly, genuine, and normal.

§ People indicated that, after it's friendly people image, "Indiana is like a surprise package, it will exceed your expectations" was appealing to more than half of people surveyed.

§ Visitors see Indiana as most appropriate for a VFR or getaway trip. Others trip types that seem somewhat appropriate include outdoor, touring, city, and historical (1997 Strategy Development Study).

Awareness and Visibility

§ Indiana is perceived as doing little or no advertising in key target markets (1999 Focus Groups)

§ Awareness of travel product by consumers tends to be vague for locations that are more than one- to two-hours away from their home (1999 Focus Groups).

Visitor Profile

Demographics

§ Across three types of studies, average age is 42-50, household income is $49,700-$53,300, married 66-82 percent, college grad 35-42 percent.

§ Visitors are somewhat younger and more upscale than conversion studies have previously indicated (1997 Shifflet Domestic Travel Report).

§ 70 percent of Loyalists and 59 percent of Upscale Interesteds traveled without children. Family travel predominates in the summer (1999 Purdue Market Segmentation Study).

Lifestyle information

§ Travelers in the Tourism-defined “Upscale Interested” group of Prizm clusters include upscale suburban families, multi-income exurban families, young white-color suburban families, midscale multi-racial suburban couples and singles, and college town singles.

§ Visitors in the “Loyalist” group of Prizm clusters include small town executive families, upscale, low-income, and rural blue-color families, mid-level white-collar couples, middle class rural families, aging couples in inner suburbs, and retirement town seniors.

§ The Chicago metro area has a greater concentration of Upscale Interesteds, while Indianapolis contains the greatest concentration of Loyalist clusters. (1999 Prizm Research).

Trip Specifics

Destination decisions

§ Decisions concerning getaway travel are similar to impulse buying – they border on the routine (1999 Focus Groups).

§ People tend to be relatively literal when considering a destination based on visual images (1999 Focus Groups)

Primary reasons for travel

§ At the most basic level, 61 percent of Indiana's visitors spending is business and meetings travel, and 39 percent pleasure travel (Economic Impact Study)

§ The top six primary reasons for travel (those earning more than a 10 percent response) were VFR, getaway trip, outdoor activities, visit a variety of attractions, wanted to see what the state has to offer, and visit historical attractions (1998 Conversion Study).

§ After VFR, Shifflet reports the major trip purposes to Indiana are getaway trips and trips including a special event.

§ There is a distinct difference in travel patterns between those traveling with families and those traveling without children, as well as seasonal differences. (1999 Focus Groups).

Distance traveled

§ Families are hesitant to travel more than three hours for a getaway, empty nesters are willing to travel much further (1999 Focus Groups).

Trip activities by DMA

§ Visitors from Indianapolis index high in camping, amusement parks, national/state parks, outdoor recreation, and cultural trips.

§ Visitors from Louisville index high in camping, gaming, sports events, and average in festivals.

§ Visitors from Cincinnati index high as getaway visitors, in special events, camping, golfing, and national/state parks.

§ Visitors from Chicago index high in special events, golfing, special and sports events, festivals, and cultural.

Trip activities by season

§ Spring visitors tend toward weekend getaways, special events, golfing, gaming, sports events, outdoor recreation, and cultural.

§ Summer visitors camp, golf, visit amusement parks, visit national/state parks, and participate in outdoor recreation.

§ Fall visitors index high in gaming, special and sports events, festivals, and cultural attractions.

§ Winter visitors take getaways, attend special events, VFR, gamble, attend special and sports events, and visit cultural attractions (1999 Market Segmentation Report).

Outdoor recreation

§ Compared to other states in the region, Indiana indexes above average in national/state parks, camping, and hiking/biking. Indiana indexes lower than the region average in beach, hunting/fishing, boating/sailing, golfing and snow skiing activities (1997 Shifflet Domestic Travel Report).

§ Ninety-two percent of Indiana adults surveyed said outdoor recreation is either essential (52%) or desirable (40%) to them.

§ Eighty-eight percent of Indiana adults participated in some outdoor activity in the last year.

§ The top five activities sited were walking/hiking/jogging, fairs/festivals, fishing, camping, and picnicking, all with responses over 50 percent.

§ Eighty-nine percent participated in these activities most frequently within the state of Indiana.

§ Fifty-seven percent would be willing to drive at least one hour to participate in their favorite outdoor activity (1998 SCORP Survey).

Cultural activity

§ Indiana indexes about average in the region for performing arts activities and slightly below average for auto/bus touring (1997 Shifflet Domestic Travel Report).